N A E P C

Web Site Manual
For the
Local Web Administrator

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Web Site Manual
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National Association of Estate Planners & Councils

Welcome

We are pleased your council has decided to host its website with the National Association of Estate Planners and Councils. Depending upon the level your council has chosen, you will now be able to utilize a variety of tools starting with an on-line membership directory and calendar of events to an event RSVP and event registrations with an on-line payment feature.

Currently your site is accessible by the public and displays all the information you provided the NAEPC including contact information and your membership directory. You can see it by visiting http://www.naepc.org, select "Find an Estate Planning Council in Your Area," located under Quick Links, then searching by state to find your local council's listing.

If you prefer, you can publicize your website requesting a domain name for direct access. There is no additional cost to activate or maintain this feature. Here are some of the suggested domain names you might want to use:

 www.epccity.org

 www.cityepc.org

Simply contact the National office at 866-226-2224 when you wish to establish your council's domain name.

NOTE: The NAEPC *does not* set-up or establish email accounts for usage in conjunction with the websites. If you do not currently have an email address or would like one to reflect the council name or the new domain name, please contact your local internet provider.

The local council is responsible for administering the site using the web-based interface, which you can access by going to:

http://admin.naepc.org

Your user name and password are both initially set to your "firstnamelastname." Once you log in, you can change these by editing your member entry using the Members tab. You can give administrative privileges to other members if necessary. (See Pgs. 6-8) Upon logging in, you will see a menu bar along the left side of your screen listing all of the administrative options. The following pages will outline each tab and its use.

WEBSITE ADMINISTRATORS
As the administrator of your council's web site, you are listed as a member and in most cases the only one with administrative privileges. **DO NOT DELETE YOURSELF FROM THE MEMBER LIST!!!** You will lose *complete* access to your web site. If you do this, you will then need to contact the NAEPC tech support to re-establish your access, which is a lengthy process and your council will be charged the web master's hourly fee to re-instate your administrative capabilities.

National Association of Estate Planners & Councils

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AN EXPLANATION OF THE ADMINISTRATIVE PAGES
FOR YOUR COUNCIL'S WEBSITE

National Association of Estate Planners & Councils

How to Begin

· Access Internet Explorer.
· Enter http://admin.naepc.org into the address bar. This will take you directly into the NAEPC web page admin area.
· Type in your user name = firstnamelastname, and password = firstnamelastname and click Enter. This will take you directly into *your* council's admin pages.

News for Council Web Site Administrators

As you have already noticed you will default to this page when you log into your site. The most up-to-date information concerning changes and additions made to the websites will be posted here under News for Council Web Site Administrators. As the web committee continues to work to provide additional benefits and upgrades to all the sites, this is the best place to find out the latest features available to your local council.

General

At the top of the page you will see, the capability to upload your council's logo. If you choose to do so, your council's logo will replace the NAEPC logo that currently appears in the upper left corner of your web pages.

The logo you add will be resized to 100 pixels wide, so that it will be the same size as the NAEPC logo located on the right side of the screen.

To Add Your Council Logo   *(The logo may be in GIF or JPEG format.)*
· Under Logo, click Browse next to the Council Logo box.
· Locate your council logo on your computer and click Open. This will place the logo in the Council Logo box.
· Click Save at the bottom of the screen. This will post your logo on your site. You can view it by clicking View Website located below the menu bar on the left side of your screen. If you do not see your logo on the public site, click Refresh on your web browser.

To Take Down Your Logo
· Simply click in the Remove Council Logo box and a check mark should appear.
· Click Save at the bottom of the screen.

Site Template Design
Here you will find a drop down menu giving you the option to change the over all look of your council's site. Once you have decided which option is best for your council, click Save at the bottom of the page and the website will immediately reflect the new look.

Council Location
Here you have the opportunity to properly reflect the area your council services.

Page Access
This tab also allows you to specify which web site features will be viewable by members only and which are viewable by everyone. If you choose Viewable by Members Only, you will need to distribute user

names and passwords to all of your members. The initial username and password will be the member's firstnamelastname.

Limiting Page Access To Members Only
· To limit access to members only, you will want to first locate the page in the column on the left.
· Next, in the Viewable By Members Only column, you will want to click in the corresponding circle. A dot should appear. That page is now only accessible to members.
· If you would like to make that page accessible to the public once again, you can do so by simply clicking in the corresponding circle in the Viewable by Everyone column.
· Do not forget to click the Save button at the bottom of the page when your changes are complete.
· If any features are designated as members only, then all public council pages will feature a login area located directly under the menu along the left of the screen.

Member Directory Warning Text
This text box is for your council to add any verbiage deemed appropriate concerning the access of your membership directory or leadership contact information.
· Type in appropriate verbiage.
· Click the Save button at the bottom of the page.

Communication

This tab allows you to send a message with one attachment (as a PDF or Word file) to all members or specified groups by email, fax or both. This feature is dictated by each member's preference in the Members tab described on Pgs. 6-8 of this manual. You control this function. If you have a Level III or IV website, you will also be able to include a hyperlink to a specific event from the online registration area of your site.

Faxes do have a minimal charge of .08 cents per page per recipient, which your chapter is responsible for reimbursing. You will receive a bill in January and June from the National Estate Planners and Councils for this use.

How To Send A Message To All Members
In the Subject line you will want to create a title for the message.
· If you wish to include an attachment, click on the Browse button next to the File Attach box. Review the See Fax Attachment Rules link before sending a message to members who wish to receive it by fax to assure the information is transferable. Fax recipients will see the attachment printed out.
· Locate the file you wish to attach on your computer and click Open. This will place the attachment in the File Attach box. Proceed by typing your text in the Message box.
· If you wish to include a signature with the message, make sure a check is located in the box next to Put signature on the message. The signature is generated from the Contact Us page information.
· If you want to Save message at council public forum, make sure a check is located in the box next to the matching text.
· Lastly you can Include details and registration link for the following event: If you choose to do so, click on the drop down menu and choose the event from the list. The list is generated from the Calendar page.
· If you would like to view your message before sending, click the Preview Message button.
· You may preview the list of members who will be receiving the message by email or fax by simply

clicking on the corresponding Preview List.
· If any of your members wish to be contacted by phone, you will want to refer to this list and make all appropriate phone calls.
· To send the message, simply click the Send Now button.

NOTE - When sending a message to All Members, that means <u>everyone</u> in the database will receive the message. So, if you denote anyone in the database as a Past Member or Prospective Member they too, will receive the message.

<u>Group Setup</u>
· To set up a specific group to receive an email or fax, you will want to utilize this option.
· Under Group Name you will want to name the list you are creating.
  ・ Type the name of the group in the text box next to Add Group.
  ・ Once you have typed the name in the box click Add Group.
· Next you will want to add members to this group. You can do this by name or discipline.
  ・ By name: If you have a few members to add to the group list, this function will be best. You may add members by entering their last name in the Search By Name box, clicking the box next to the correct member and clicking Submit at the bottom of the page. Choose your next member by repeating the steps above.
  ・ By discipline: If you choose to search by discipline, click the down arrow attached to the Search By Discipline box, review the list and click the appropriate listing.
    · All: You may choose the entire list by clicking All in the Search By Discipline box.
  ・ You may also use this option when choosing multiple members from the entire directory to receive the email who may not fall under just one particular discipline.
  ・ Click Add Group when you are finished creating your group.

<u>Send to Groups</u>
You will want to follow the same directions as composing a message for the entire membership only now you will choose which group will receive the message, rather than which members.

<u>Message History</u>
This will tell you what messages have been sent through the website and how they were distributed - email, fax, phone, along with which options were used.

<u>Fax History</u>
This page will give you a report on the latest message that had been sent and its status.

<u>Email History</u>
This page will give you a report on the latest message sent and its status.

<u>Council Email Recipient</u>
Until now, a council administrator could specify only one email address to use as the recipient of all emails generated from website activity. Now you can specify a different email address for general email, event RSVPs and membership inquiries. Use the Contact Us tab to set additional addresses. No action is required to continue using just one address.

Home Page

This tab allows you to upload a photo to your home page offering a more local feel for your site. Here you can also specify the text that will appear on this page. You can edit these and other features as often

as you wish and updates occur in real time. (You might need to click Refresh on your web browser to see the results of your change.) *This page does not have the option of being restricted to members only.*

Add A Photo To The Home Page
· Under Home Page - Admin, click on Browse next to the Photo box.
· Look for the photo you wish to post from your computer. This must be a JPEG file. Click Open. This will place the photo in the Photo box. (Many chapters use pictures of their city.)
· Click Save at the bottom of the screen. This will post your photo on your Home Page. You can view it by clicking the View Website on the left side of your screen. If you do not see your photo, click Refresh on your web browser.

* Note: The council site design looks best with a home page photo that is exactly 600 pixels wide and between 100 and 250 pixels tall. Here are some suggestions for finding good panoramic photos:

1. The photo you use should be in JPG format and be exactly 600 pixels wide. It also looks best if the height is between 100 and 250 pixels. You can resize and crop a photo in any software used for photo editing, such as PhotoShop, Paint Shop Pro or GraphicConverter (Mac).

2. It is not legal to copy photos from other websites without their permission. If you do a Google image search, for "Your_city skyline," you will find plenty. The best ones likely appear on the websites of professional photographers. You can contact a photographer and explain your use. You can also offer to post a photo credit or link back to his site in exchange for the limited use if his photo.

3. There are some websites that license stock photos (existing photos for various approved uses) that might feature a nice photo of your city skyline. If you license a stock photo, get the lowest resolution that is still at least 600 pixels wide. They licensing cost is usually tied to the resolution.

Here are some recommended stock photo websites:
www.istockphoto.com (very inexpensive, but good quality)
www.wpanorama.com (contains some U.S. Cities)
www.gettyimages.com/Creative/Frontdoor/PanoramicImagesRM (Very Expensive, but allow for exclusive rights)
www.inmagine.com/us-cities-photos/indexstock-inx023

Here are some other good stock photo sites you might want to visit:
www.snapvillage.com
www.dreamstime.com
www.shutterstock.com

· If you have trouble finding a photo that will work on your website, please contact National and we can aid you in this process.

Take Down Photo
· Click in the Remove Home Page Photo box and a check mark should appear.
· Click Save at the bottom of the screen.

Home Page Text
Type in the text you would like posted on the Home Page and click Save at the bottom of the screen.

About Us

Like the home page, you can enter textual content to appear on this page. You might want to write a brief history or mission statement and post it on this page. Type in your text and click Save at the bottom of the screen. (*This page does not have the option of being restricted to members only.*) You can also copy and paste from a preexisting document.

Calendar

Use this tab to add upcoming council events to your web site. Only future events will appear on the public calendar. When you post your event, it will default to also be shown on the NAEPC national calendar, unless you uncheck the Show this Event on National Calendar box.

Past events will automatically come off the public site once the date has passed however, if you want to take them off the administrative pages you will have to go in and delete them manually. You are not required to delete past events as they can serve as a history.

This page can be restricted to members only. If you want this page to be restricted to members only please click the circle next to "Yes" under the question: Do you wish to restrict the Calendar and Next Meeting page so that only members can view it? If you do not want it to be restricted make sure the circle next to "No" is marked.

To Add an Event
· Under Calendar-Admin, click Add New Event.
· Fill in all event fields with the correct information
  · Event Date
  · Event Time
  · Event Title
  · Speaker
  · Image - If you would like to include a photo of your presenter, you can do so here.
    · Click Browse next to the Image box.
    · Locate the presenter's picture on your computer and click Open. This will place the picture in the Image box.
· If you would like to attach a document simply click the box in front of the document you wish to attach under Related Documents. This list is pulled from the Document Library.
· If you would like to attach a link simply click the box in front of the link you wish to attach under Related Links. This list is pulled from the Links page.

*** If you are a Level III or IV website continue below. If you are a Level II website finish by following the next step.**

· Click Save New Event at the bottom of the page.

*** If you are a Level III or IV website continue here:**
· Choose "On" if you want to allow online Event RSVP. If you choose to turn it on, you will then need to proceed to the EVENT RSVP ONLY section.
· Choose the payment methods your council accepts.
· Enter event fees.
· Click Save New Event at the bottom of the page.

When you send a broadcast message to your members, they will have the option to select any upcoming events. Site visitors can click on the calendar item to RSVP as well.

* If you are a Level IV website continue here:
Once your merchant account has been established and the necessary information has been provided to the NAEPC (see below), your site is ready to go live. Please make sure the Live Mode box in the Plug-N-Pay Settings section at the bottom of the Calendar-Admin page is checked.

Once the merchant account is established, the council needs to get the banking processor information:

· Find out with which of the following networks your account has been established:

Barclays	Mercury Payments
Buypass	JNCB
Caixa Catalunya	Nova
EPX	Pago
FDMS Nashville	Paymentech Salem
FDMS Intl	Paymentech Tampa
FDMS Omaha	Planet Payment
Fifth Third	Royal Bank of Canada
Global Payments	Universal
Global Collect	Vital/TSYS
Cardsystems/PaybyTouch	Wirecard

· Then they also need to provide you with the parameters for your account - on that network, sometimes referred to as a "MID- TID", but can also be "VAR Data".
· Once you have this information you will need to supply it to the NAEPC office so the account can be activated.

Past Presidents

Use this tab to create a listing of all local council Past Presidents.
· Enter the text you wish to be displayed on the Past Presidents page.
· This page can be restricted to members only. If you want this page to be restricted to members only please click the circle next to "Yes" under the question: Do you wish to restrict the Past Presidents page so that only members can view it? If you do not want it to be restricted make sure the circle next to "No" is marked.
· After you enter the text in the Past Presidents text box, click Save.

Members

Use this tab to maintain the list of members available on the site for viewing and downloading. Functions that can be restricted to members only are described on Pgs.1-2 of this manual, under the General tab.

When you upgraded your site from a Level I-Splash page, the National Estate Planning Council technical support imported the data you provided. (* If you have not yet emailed your database to the NAEPC for posting, you will need to send the information in an Access or Excel spread sheet to kim@naepc.org)
The following fields (columns) are required in the database:
First name
Middle initial or name
Last name

Suffix (Jr., Sr., III)
Designations (AEP, CPA, JD, Esq. etc.)
Company name
Title at Company
Discipline (Attorney, Financial Planner, Trust Officer, Business Consultant etc.)
   You may specify up to 4 disciplines for each member.
Address
Address 2
City
State
Zip Code
Phone
Fax
Cell
Email address
Web address
Officer Title (if applicable)

Once the NAEPC has received your membership database, each member's information will be uploaded to the Members page with the contact preference set to "email" for those who have an email address and "fax" for those who do not have an email address, but have a fax number.

To Change Contact Preference
· Click the box in the appropriate column:
   ・ Email Pref.
   ・ Fax Pref.
   ・ Phone Pref.

User Name and Password
The NAEPC also sets each member's user name and password. Both user name and password are the member's first and last names combined with no punctuation or spaces, such as "firstnamelastname."

As the administrator, you can use any method, including giving everyone the same password if you so wish. When members first log in, they will be prompted to change their passwords. If you want to establish each member having the same password, please contact the NAEPC at admin@naepc.org.

Changing User Name and Password
· Click the pencil (✎) in the Edit column next to the member's name.
· This will take you to that particular individual's membership information form where you will see the member's name displayed at the top of the page as well as the date of the last update for that particular member.
· On this page you can change:
   ・ A particular member's Personal Information including first name, middle name, last name, suffix and designation. Here you can also upload individual member's photos by clicking Browse next to the Photo box. Locate the member's picture on your computer and click Open. This will place the picture in the Photo box.
   ・ Login Information where you can change the individual's username and password.
   ・ In this portion of the form you can also designate the member as an administrator which would

allow that member the same access to the website that you are viewing currently.

* *The NAEPC recommends only allowing one other member as an administrator for your council's web pages. We suggest a board member. (The fewer individuals making changes to your web pages, the more likely they will remain accurate.)*

· Business Information, all information including business name, title, discipline, address, city, state, and zip can be changed. If you are changing the member's discipline and can not find what is needed in the drop down list, simply add the discipline desired in the Add new discipline as # 2: text box. Once you have saved this new discipline, it will be added permanently to your drop down list.

· Under Contact Information, the member's phone number, fax number, cell number, email address and web address and member status can be updated at your discretion. Here you can also designate what information if any under this heading is posted on the website.

· Under Member Information, you may add any additional information you would like displayed about that particular member especially any additional specialties, etc. in the Additional Information to Display (e.g., subspecialties) text box.

· Under Member Status, you can change an individual member's category by choosing from the drop down list under Change Category to including Active Member, Past Members and Prospective Members. Active Members will be displayed in your membership directory. Individuals marked as Past Members or Prospective Members will not be displayed in the membership directory but will receive correspondences sent to All Members.

· Under Council Leadership, this is where you choose the officer titles for the council's Executive Committee and Board of Directors. The members with choices made from the Officer Title drop down menu will then automatically populate the Leadership page.

Deleting Members From the Membership Directory Permanently
In the last column on the far right, simply click the trash can (🗑) in the Delete column. This member will be taken out of your membership records and off your council website.

Locating Members in the Directory
You can use the alphabet at the top of the page to go to any listing of members by last name for easier locating capabilities.

You can use the Next Page option to scroll through the directory.

Using the Web Membership Directory as a Member Database
We recommend keeping the website directory as up-to-date as you would your master membership database. ***This directory is not intended to replace any other system*** you may already have in place to track membership dues, history, etc. You may download the database from the site in Excel or Access formats – see Pg. 9, to compare with your office records.

ATTENTION: WEBSITE ADMINISTRATORS
Lastly, as the administrator of your council's web site, you are listed as a member and in most cases the only one with administrative privileges. **DO NOT DELETE YOURSELF FROM THE MEMBER LIST!!!** **You will lose *complete* access to your web site.** If you do this, you will then need to contact the NAEPC tech support to re-establish your access, which is a lengthy process and your council will be charged the web master's hourly fee to re-instate your administrative capabilities.

Database

Use this tab to download **a copy** of your current member database. This action will not delete the database from the website. You are going to download (pack) the member listing into one of the following:

Excel
· Click Excel.
· Click on, click here.
· This will download into a XLS (Microsoft Excel 97-2002) file. (Packing the member listing may take a while, please be patient.)
  This member listing is for reference only! Please do not attempt to upload this file back into the system!
· The Excel spread sheet will appear on your screen.
· In the columns listed, displayphonenumber, displayfaxnumber, displayemailaddress, the "1" means yes and the "0" means no.
· Save this database to your computer.

- or -

Access - MDB (Microsoft Access 2000) file
· Click Access.
· Click on, click here. (Packing the member listing may take a while, please be patient.)
· Save to your personal computer.
· Open file.
· Click on the Forms tab on the right hand column on your screen.
· Click on "admin_form".
· Using the admin_form you can edit, add, and delete members.
· To leave the database, click Exit in the lower right hand corner of the form.

After you download the mdb file and edit it, please contact National to upload your updated membership information onto the site. National will do this once a year free of charge.

Links

Use this tab to add up to 25 links to other sites, such as related associations or governmental resources.

Set Up
· Under Title, type in the title of the link you are going to display on your website.
· In the Hyperlink column, type the corresponding link to the site you have chosen.
   · The Hyperlink must include "http://"
· *You may restrict the Links page as a members only page by clicking the circle next to the "Yes" under the question, "Do you wish to restrict the Links page so that only members ca view it?" If you do not want it to be restricted make sure the circle next to "No" is marked.*

Document Library

Use this tab to add numerous documents to your website including membership applications, speaker presentations, newsletters, etc. If you wish to post your council's membership application on your website you must upload your application on this page.

This page can be restricted to members only. If you want this page to be restricted to members only please click the circle next to "Yes" under the question: Do you wish to restrict the Document Library so that only members can view it? If you do not want it to be restricted make sure the circle next to "No" is marked.

Under the heading Documents in the Library you will see a list of all the documents you have uploaded to your site and the date they were posted.

Any type of file can be used.

Downloading Documents to the Library
· Go to the area located under the heading Add a New Document.
· Next to the New Document box click Browse.
· Choose the document you would like to post from your computer.
· Click Open.
· Type in the title of the document in the Title box.
· If you would like to categorize the documents you may do so by clicking on Edit Categories.
· Type in the name of the category you would like to add in the box under Add a Category, then click Add Category. Lastly click Return to Library.
· Choose the proper category from the dropdown menu next to Category.
· Click Upload.
· The document will be posted under the Documents in the Library heading.

After uploading a document to the library you may edit the title by clicking on Edit and typing in the new text.

If you wish to delete a document, simply click the Delete box.

Membership Form

Use this tab to choose the membership application you posted in the Document Library.

Posting Membership Applications
· Under Select the type of application form you would like to offer: choose one of the following:
  · Default Interactive Application Form
    · This form is one set up by the NAEPC for general chapter use.
      (This form can not be altered for individual council use.)
    · Click Submit.
  · No Application Form
    · No application will be listed on your council's website.
    · Click Submit.
  · Use the following Form(s) from the Document Library

· You will see a listing of all the documents you have uploaded to the Document Library.
· Choose the membership application you posted.
· Click Submit.
· If you did not post any documents in the Document Library it will say: "There are currently no documents in your library." You will then have to choose one of the first two choices or upload your

application into the Document Library.

Membership Renewal

Use this tab to establish membership renewal on line.

To Activate On-line Membership Renewal
- To activate this feature place a check in the box next to Activate Membership Renewal. If you do not check this box, individuals visiting your website will not be made aware that this feature exists.
- Next, click on Add New Option. You will then want to enter the description (Ex. Member Renewal) in the Description text box.
- Enter the cost in the Renewal Fee box.
- Once you have completed the steps above, click Save New Option. This will take you back to the Membership Renewal Admin page.
- On the Membership Renewal Admin page you will now want to place a check in all the boxes next to the payment methods your council wishes to accept.
- Membership Add On Fees are an optional feature. Here you may add any categories your council wishes to include such as payment for a membership directory or payment for the entire year's events. To do so:
  - In the box next to Type, enter in the feature you would like to include.
  - In the box next to Cost, enter the fee for the corresponding feature.
- Do not forget to click on Save Edits at the bottom of the page anytime you make any changes or additions.

Member Benefits

Use this tab to add any local member benefits you may offer your council members. If you do not have any member benefits being offered you may skip this page. Without any benefits entered, this tab and page will not be viewable by the public.
Add a New Member Benefit
- Click on Add New Benefit.
- In the box next to Title, enter the name of the benefit you are offering.
- Next to the Image box, click Browse.
  - Choose the logo from your computer files.
  - Click Open.
  - Click Submit.
- In the Link Address box enter the link to the website of your member benefit company.
- In the Text box enter any text you would like to use to describe and/or use to market the member benefit.
- Click Submit.

Patrons

Use this page to add patron banners and links to the Patron's page on your site. Images will appear in their original size, so be sure to size them properly before uploading them. You may want to request all your banners in the same size. Patron image files must be GIF, JPG, or JPEG.

If you have problems sizing the banners, contact tech support at admin@naepc.org.

<u>To Add a New Patron or Sponsor</u>
· Find the Add a New Patron or Sponsor box.
  (If you have not posted any patrons to this page as of yet, the first thing you will see is the Add a New Patron or Sponsor box. If you have already posted patrons to this page, you will need to scroll down to the bottom of the page to find the Add a New Patron or Sponsor box.)
· Skip the next step if you are a Level II web site and proceed to Pg. 12.

Level III & IV websites only:
· In the Type box, there is a drop down list. Choose one of the following:
    ‧ Patron (468 pixels wide x 60 pixels)
    ‧ Home Page Sponsor (120 pixels wide x 60 pixels high)
    ‧ Top of Page Sponsor (468 pixels wide x 60 pixels high)
· In the box next to Caption, type in the text you would like posted along with the patron's logo if any.
   (To make a multi-line caption insert "<br>" to insert line breaks.)
· In the URL box, type in the patron's website address. You must keep the http://
· Next to the Image (optional) box, click Browse.
    ‧ Choose the logo from your computer files.
    ‧ Click Open.
    ‧ Click Submit.
· Next you can designate four additional tiers within the Patron sponsorship category. Under Patron Levels, you will find four boxes named Patron Level 1, Patron Level 2, Patron Level 3, Patron Level 4. In these boxes you can name the tiered levels such as "Platinum," "Gold," "Silver," and "Bronze." The logo, caption and URL will post in the General Tools-Admin Patrons box.
· Click the banner you are posting or editing before you logout by clicking, click here to check this banner, located under the banner you posted. This will test if the link to the patron's website is working.

<u>If You Want To Delete A Patron</u>
· In the far right column you will see the delete icon (🗑).
· Click on the delete icon.

Once you have posted your patrons to your website, you will be able to see how many visitors clicked on that patron to check out their website. You will find this information in the second last column from the left called Clicks.

Council Information ~ Available on Level III & IV websites only.

Use this page to add any additional information about your local council.

This page can be restricted to members only. If you want this page to be restricted to members only please click the circle next to "Yes" under the question: Do you wish to restrict the Council Info page so that only members can view it? If you do not want it to be restricted make sure the circle next to "No" is marked.

When you are done typing in the desired information click Save at the bottom of the page.

Leadership

Note: There has been a change in the method used to administer the Leadership (Officers) list for your council. Formerly this page was used to upload photos and text for the four top officers, plus text for the remaining. Now you have a more flexible method. For any member you want to list on the Leadership page, use the Members tab to select your members, one by one, and edit them to select their office title from the available list (at the very bottom of the edit screen). You can also add a photo for each officer (as well as any other member). If you had data in the prior format, we converted that information to the new method.

Committees

Like the About Us and Home Page, you can enter textual content to appear on this page. Type in your text and click Save at the bottom of the screen. (*This page does not have the option of being restricted to members only.*) You can also copy and paste from a preexisting document.

Privacy Policy

Like the Committees page, you can enter textual content to appear on this page. This page is specifically set aside for your council's privacy policy. Type in your text and click Save at the bottom of the screen. (This page does not have the option of being restricted to members only.) You can also copy and paste from a preexisting document.

If no text is entered this page will revert to a link to the National association website (NAEPC.org).

Contact Us

Use this tab to change the contact information for your council and to specify different email addresses for event RSVP messages, membership form submissions, and general council contact.

Inserting/Updating Your Council Contact Information
· Under Council Name type in the name of your local council.
· In the Contact Name box, insert your name.
· Firm Name of Contact - type in your firm's name or your local council's name.
· General Email Address - type in the email address of the designated individual. This address will receive emails when anyone wishes to contact your council in general.
· Event RSVP Email Address - type in the email address of the designated individual. This address will appear in all recipients "From" box when broadcast emails are sent out. This address will also be the only address that receives responses from the interactive application forms and event RSVPs.
· Membership Email Address - type in the email address of the designated individual. This address will receive all membership applications filled out on line.
· Address, City State, Zip Code, Phone Number, Fax Number - type in your information.
· Click Save at the bottom of the page.

Logout

Clicking Logout will end your session.

Other Features

Please also test your web site's Contact Us and Apply Online features to be sure they generate email to the intended recipient with all entered data.

In any of the boxes where you enter text for your web pages, you can include basic HTML tags for:
    boldface
    <u>underline</u>
    <i>italics</i>
    hyperlinks.

Technical Support

The NAEPC office is your first and only call for technical support. You can reach us at admin@naepc.org or 866-226-2224.

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